

Coordinated Access and Assessment System Navigator Orientation

June 17, 2014

2:30PM

Our Daily Bread Employment Center

Welcome!!

Navigating and Matching Process

Purpose: *Rapidly get vulnerable clients from assessment to housing*

- Once a client is assessed using the BDAT, they will be **prioritized for the appropriate intervention** to end their homelessness
- A Navigator will be assigned to clients based on their BDAT score to get them rapidly **document ready**
- The Navigator will be in regular communication with Community Matchers to signal when the client is **ready to be matched** with housing

What does a CAA System Navigator do?

- Navigators **help highly-vulnerable homeless persons get housed** through the CAA system
- Serve as point of contact for both the client and the CAA System Matchers
- Help clients become match ready – at a minimum, assists clients in assembling documents needed to enter housing
- While a client is waiting to be matched, the Navigator maintains contact with the client and may ensure they attend required appointments, connect with benefits and services, and overcome barriers as they arise in the housing process.

Who will be CAA System Navigators?

- Any service profession whose job responsibilities include: **finding housing for homeless clients should become a navigator.** (*Outreach workers, case managers, housing locators or specialists*)
- For an effective CAA system, **there must be System Navigators throughout our Continuum**, particularly in emergency shelters, transitional housing programs, drop-in/resource centers, amongst our outreach teams, and in our behavioral health programs; wherever vulnerable and homeless individuals and families are being served already.

****Other requirements:**

- Navigators must be employees of an organization who provides behavioral health services, homeless outreach, or case management.
- Navigators must have a supervisor responsible for ensuring they carry out their responsibilities ethically and appropriately.

BDAT (Baltimore Decision Assistance Tool)

- **Common Assessment Tool**
- **Triages Clients to the Most Appropriate Intervention**
- **Accounts for Single Individuals and Families in a single assessment**
- **Based in the VI-SPDAT**
- **Developed through a collaborative process**

https://docs.google.com/forms/d/1-VUDEw2JDGy7v-XKg0YT_NW2NvROVHI5QC_W9tKf_6o/viewform

BDAT (Baltimore Decision Assistance Tool)

Baltimore Decision Assistance Tool Survey

We are here today to talk to you about your housing and service needs. If you give us permission, we will ask you some questions about your health and housing for about 10 minutes. Some of the questions we ask might make you feel uncomfortable or be upsetting. If you feel uncomfortable or upset during the interview, you may ask the interviewer to take a break or to skip any of the questions. At any time you can request that your information be removed from the database. No one will be upset or angry if you decide not to be interviewed today, but this will be required if you'd like to be considered for this permanent housing opportunity. This information will not be used for any other purpose, and it will benefit you to be as honest as possible, especially since you will need to verify some of these answers later.

If you'd like to proceed, we will need your consent to use and share the following responses for that purpose.

****PLEASE MAKE SURE CLIENT FILLS OUT CONSENT/RELEASE BEFORE PROCEEDING****

****IF CLIENT DOES NOT FEEL COMFORTABLE ANSWERING A QUESTION, PLEASE TYPE "REFUSED" IN FIELD****

* Required

PRESCREEN QUESTIONS

1. What brings you here today? Why are you calling today? *

Use response to decide if BDAT is appropriate and begin filling in information.

2. Where did you stay last night? *

If staying in a facility, give the name of the facility. If staying on the street, give the closest landmark or intersection (so outreach workers can look for them).

Please select the type of location stated above. *

- ☐ Emergency Shelter
- ☐ Safe Haven
- ☐ In a car, on the street, or another place not meant for human habitation.
- ☐ Transitional Housing for homeless persons
- ☐ In a foster care/group home
- ☐ A hospital
- ☐ Jail/prison/Juvenile detention center
- ☐ Long-term care facility
- ☐ Psychiatric hospital or other facility
- ☐ Residential project or halfway house
- ☐ In a substance abuse facility/treatment center
- ☐ In own housing (rental)
- ☐ In own housing (own)
- ☐ With a friend/family members/other doubled up situation
- ☐ In a hotel/motel (without voucher)
- ☐ Doesn't Know
- ☐ Refused
- ☐ Other:

Matching Clients with System Navigators

Using the PMCP (Performance Management and Communications Platform) the **Community Matchers will connect clients with specific System Navigators** based on their priority in the housing intervention and on the following factors:

- 1) **Existing client-worker relationships** (from BDAT)
- 2) **Where client stays at night** (from BDAT)
 - Shelter/TH program clients → Shelter/TH program CMs
 - Sleeping outdoors → Outreach team
- 3) **Where client spends time during the day** (from BDAT)
 - Drop-in center navigators
- 4) **Any specialized supportive service for which the client qualifies**

Navigator Duties

- **Required:**

- Verify BDAT responses
- Help client assemble and store documentation
- Update PMCP as necessary
- Coordinate client attendance at appointments
- Mediate with housing program and landlord
- Connect client to long-term CM if needed
- Assist client with obtaining income, benefits, and community supports, including disability income, food stamps, health insurance, utility and security deposit applications for housing

- **Optional:**

- Transport clients
- Accompany client to appointments
- Coordinate with client's health providers

Navigator Duties (cont'd)

Complete “Match Initiation Form” when client is “Match Ready”

- ✓ **Identity** documents (ID, SS, and BC or acceptable alternatives)
- ✓ **Income** documentation (No less than 30 days old)
- ✓ **Homeless status** documentation (Category 1, 4, or Chronic; must document 3rd party attempt)
- ✓ **Proof of disability** (Provider licensed by state to Dx disability)
- ✓ **HABC required documents:** HABC ROI, NCR Form, Supportive Services Agreement including name of CM, Referral Form

Weekly Case Conferencing

Troubleshoot match readiness

Client Update Form

Match Initiation Form

Troubleshoot Housing Placement Process

Case Conferencing Tool

Case Conferencing Demo 6-1-14 ☆

File Edit View Insert Format Data Tools Add-ons Help All changes saved in Drive

Comments 8h

| Timestamp | Ready to do a Match Initiation Form for this client? | 1. Unique Client Identifier | VI-SPDAT SCORE | Has this client signed a release of information? | Notes | Do we know how to contact this client? | Does this client have a Navigator? |
|---------------------|--|-----------------------------|----------------|--|-------------|--|------------------------------------|
| 11/18/2013 17:56:23 | No | 4MIMA1115131a | | 15 Yes | | Yes | Yes |
| 11/19/2013 10:00:53 | No | 4NASC111813-1A | | 12 Yes | | | |
| 11/19/2013 10:30:17 | No | 4SAWA1119131a | | 4 Yes | | | |
| 11/19/2013 17:23:57 | Yes | 4AIEN111913-1a | | 11 Yes | Needs SS | Yes | Yes |
| 11/19/2013 17:47:01 | No | 4AIEN111913-1b | | 4 Yes | | | Yes |
| 11/19/2013 18:01:24 | No | 4ROZI111913-1A | | 11 Yes | Verify Docs | Yes | |
| 11/20/2013 10:07:14 | No | 4MIMA111513-1ab | | 9 Yes | | | |
| 11/20/2013 15:41:24 | No | 1652354 | | 8 Yes | | | |
| 11/20/2013 15:53:47 | No | 4AIEN112013-1a | | 6 Yes | | | Yes |

Client Update Forms

- Used to update, clarify or change answers on the Common Assessment Tool and/or the Match Initiation Form.
- All updates are sent to the Community Coordinator and will be updated in the respective form
- **Updates may result in a change to the client's score

https://docs.google.com/forms/d/1S4Z_vdBffoeu7lGesPrjcTxEbIjIKWl4vyg3F51lF4/viewform

Client Update Forms

Client Update Form

Please use this form to update, clarify or change answers on the BDAT Screener and/or the Matching Initiation Form. Your updates will be sent to your Community Coordinator and will be updated in the respective form(s) within 3 business days unless you have been notified otherwise. Please note that an update to answers on the BDAT Screener may result in a change to the client's score, while an update to the Match Initiation Form may result in changes to the types of Permanent Supportive Housing your client is eligible for.

* Required

Background Information

Before we begin, we just need a little information about you and the client you wish to update information for.

What is the Unique Client Identifier of the Client for whom you would like to update their records? *

Note: If you need to change the Unique Identifier, you can do so below in the General Information Section.

Client Update Forms

Updates to Answers on the BDAT Screener

If you have updates to the answers in the BDAT Screener, please complete this section. Otherwise, you can go on to the "Update to Answers on the Matching Initiation Form".

For Any Changes to the Prescreen Section (Questions 1-7), please describe the needed changes/updates below.

Please remember to start your update by telling us the number(s) of the question(s) in this section that you wish to update and if the answers are multiple choice or a list, please make sure that your answer is one (or more) of the choices provided. If you'd like to change the Unique Client Identifier for this client, here is the space to do this!

A large, empty rectangular box with a thin black border, intended for the user to provide updates to the BDAT Screener answers. It occupies the central portion of the form below the instructions.

For Any Changes to the General Information Section, please describe the needed changes/updates below.

Please remember to start your update by telling us the number(s) of the question(s) in this section that you wish to update and if the answers are multiple choice or a list, please make sure that your answer is one (or more) of the choices provided.

Housing Match Process

- Once Client is “match ready” / “document ready” a System Navigator will fill out a **Match Initiation Form**
- The form collects information about a **client's preferences** for housing, as well as collects additional information that will help determine if a client is **eligible for a specific placement**

<https://docs.google.com/forms/d/1vBOt4KPjJFKzTMrHKZ1zonDJulpTBPzkXQySZIErtnw/viewform>

Match Initiation Form

Match Initiation Form

This form is used as an addendum to the VI-SPDAT Screener. This Match Initiation Form includes questions that will assist with making a match to a unit of Permanent Supportive Housing in Los Angeles County. These questions will assess for basic eligibility requirements of these resources, making it possible to prioritize housing placements for those with the highest acuity as determined by the VI-SPDAT Screener. This form will also document client preference relative to where he/she would like to live in permanent housing, making the unit match possible for their community of origin (where they are currently homeless) or their top two community preferences. The VI-SPDAT Screener must be filled out before this form, either administered at the same time as the VI-SPDAT Screener, or sometime there after.

* Required

Background Information

1. What is the Unique Client Identifier of the client ready for housing match? *

2. First Name of Point of Contact (POC) working on housing this Client. *

POC will be the person contacted to match this client with permanent supportive housing. In most cases, the POC will be the client's Navigator.

3. Last Name of POC working on housing this Client. *

Match Initiation Form

Questions to Assist with Housing Match

8. Do you need an individual or family unit?

9. If a family unit is needed, how many children (under 18) for whom you have full legal custody will be living with you? *

10. If a family unit is needed, are there any adults (18+) who will be living in the unit? *

11. If one or more adults in addition to you will be living in the unit, please list each adult and her/his relation to you.

12. If a family unit is needed, how many bedrooms are required? *

13. Do you need shared housing? *

Two or more unrelated people share a 2 or more bedroom unit.

14. If you reside within the City of Los Angeles, which community do you live in? *

Demo of Matching Tool

Community's Matcher uses this to see everyone who is eligible for a specific vacancy and begin the process of paring down the list using additional prioritization criteria.

<https://www.youtube.com/watch?v=KKIfFG5-yNY>

Matching Criteria (preliminary)

- 1) Vulnerability (BDAT score)
- 2) Existing client relationship at housing program
- 3) Length of time on the street, refusing shelter (Living environment physically observed by an outreach worker)
- 4) Length of time verified homeless (earliest Category 1 episode documented by 3rd party, e.g. HMIS, shelter staff, or outreach worker)

Navigator Role During and After Housing Placement

- Warm-hand off if client is going to a program with support services
- Connecting clients with community based case management services if housing doesn't come with support services
- Remaining accessible to client in case housing becomes unstable
- Connecting client to furniture resources and community-based services

Questions?